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AutoMerge - Intelligent Deduplication for Dynamics CRM

ANALYZE

- Use AutoMerge Management Portal to start analysis request on your Leads/Accounts/Contacts
- Detect duplicate records using our intelligent matching rules, customize them to your business
  - Match any OOB/Custom or N:1 related (e.g: Parent Account) field
  - Fuzzy-matching allows for nicknames, misspellings, phone/address/company name variants, etc…
  - Cross-field-matching finds duplicate phone/email/street/etc… across many fields in single rule
- Matches are ranked w/ customizable rules to set the appropriate Winner record
  - Create multiple Ranking rules using any OOB/Custom/N:1-related field
- A precision % is applied to each duplicate set based on how closely matched the records are
- Duplicates are tagged in your CRM for review and you are notified via email when it's complete

Microsoft Dynamics CRM

Online/On-Premise v2011/13/15/16/D365

Microsoft Azure

Get Your Free Data Quality Report

Find out how many duplicates you have with a no-obligation data quality report.

220 NW 8th Ave, Portland, OR, 97209 503-914-6304 | sales@genbil.com | automerge.com

AutoMerge - Intelligent Deduplication for Dynamics CRM

VALIDATE

- You validate the matched sets in duplicate views within your CRM system
- Use Precision % value to view high vs low-confidence matches
- Add your own columns to the duplicates views to compare across matched records
- Determine a low-threshold *safe* precision % for automatic AutoMerging (see next slide)

Microsoft Dynamics CRM
Online/On-Premise v2011/13/15/16/D365

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AUTOMERGE

- Our AutoMerge tool replaces the tedious built-in Merge Wizard
- AutoMerge performs the merge for you preserving data from loser(s) to winner
- Log in to the AutoMerge Management Portal and automatically merge all duplicates above your predetermined low-threshold *safe* precision %.
    - With this method, any number of duplicates can be triggered for AutoMerging. Our Azure service will work through the matched sets for hours/days/weeks if necessary.
- Also Trigger AutoMerge manually on multiple duplicates directly from your CRM list view.
    - Typically this is done for match sets BELOW your low-threshold safe precision % and only after you have visually scrutinized the matches.

Microsoft Dynamics CRM

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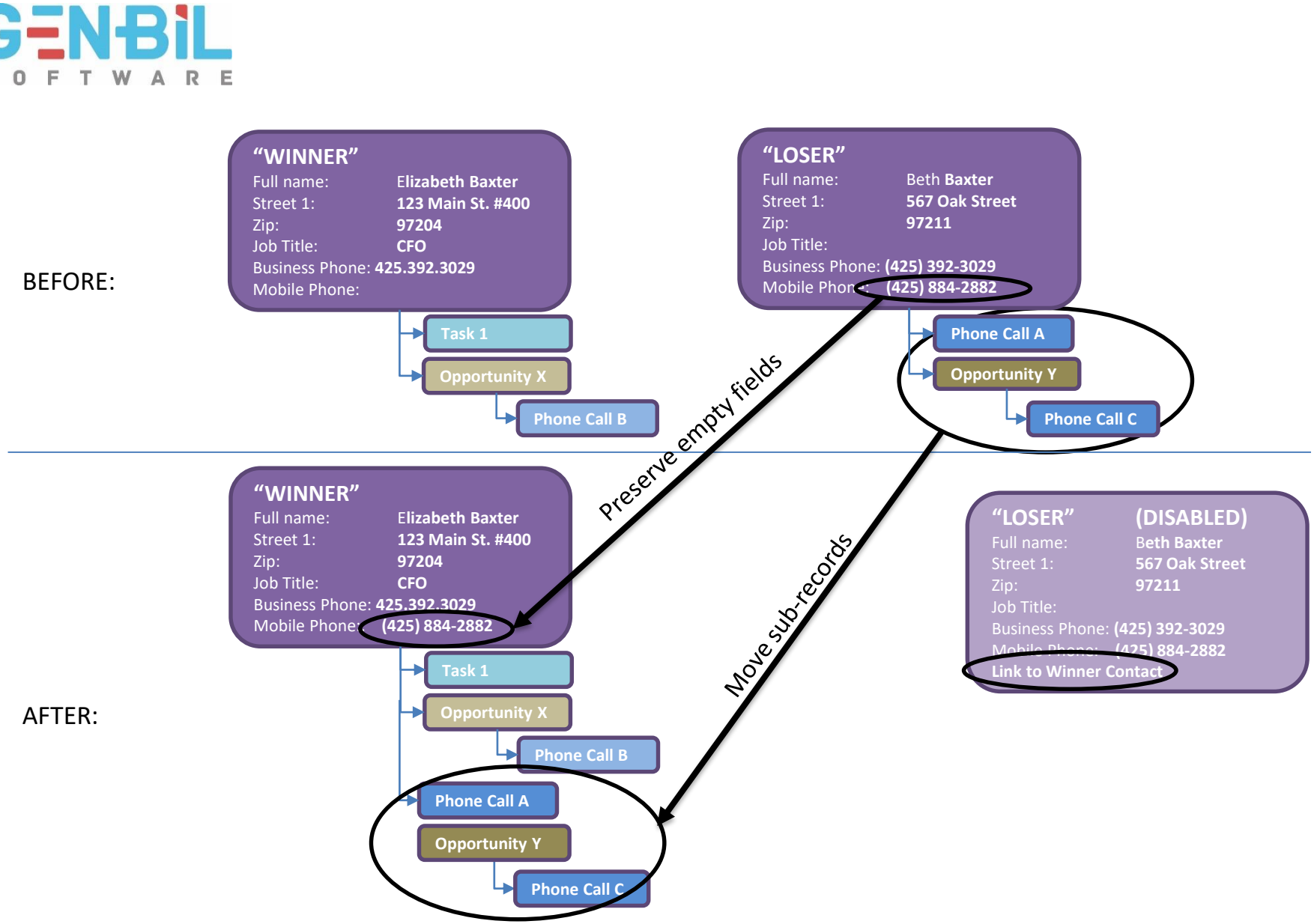
CRM versus AutoMerge: **Duplication Detection**

FEATURE	CRM	AUTOMERGE
Whole String Match (jess@acme.com *matches* jess@acme.com)	✓	✓
Partial String Match (first 5 characters of ZIP: "97225" *matches* "97225-6700"	✓	✓
Multiple Sets of Match Criteria	Limited	Unlimited
Match Criteria using fields on Merge-able Record (e.g. Contact)	✓	✓
Match Criteria using fields from related records (e.g. Parent Account's Main Phone)		✓
Alternate Spellings / Common Misspellings / Phonetic ("Snider" *matches* "Snyder")		✓
Firstname=Nickname Matching ("Bob" *matches* "Robert")		✓
Phone Punctuation Ignored "(503) 555-1212"="503.555.1212"="15035551212"		✓
Company Name Variants ("The Acme Company" *matches* "Acme")		✓
Street/State/Country Address Variants ("123 W. Main St" *matches* "123 West Main")		✓
Emails Match Across All Email Fields (3 out-of-box fields default, configurable) [email1: jess@acme.com *matches* email3: jess@acme.com]		✓
Phone Numbers Match Across All Fields(11 OOB fields default, configurable) [Home phone: 503.555.1212 *matches* Other phone: (503)555-1212]		✓
ZIP Codes and Streets Match across the First and Second Address Blocks		✓
Match Precision metric informs you how close a match for each duplicate set		✓
Duplicate Detection Partitioning		✓
Match Leads to Existing Accounts (no merging performed)	Limited	✓
Match Lead to Existing Contacts (no merging performed)	Limited	✓

CRM versus AutoMerge: Merge Functionality

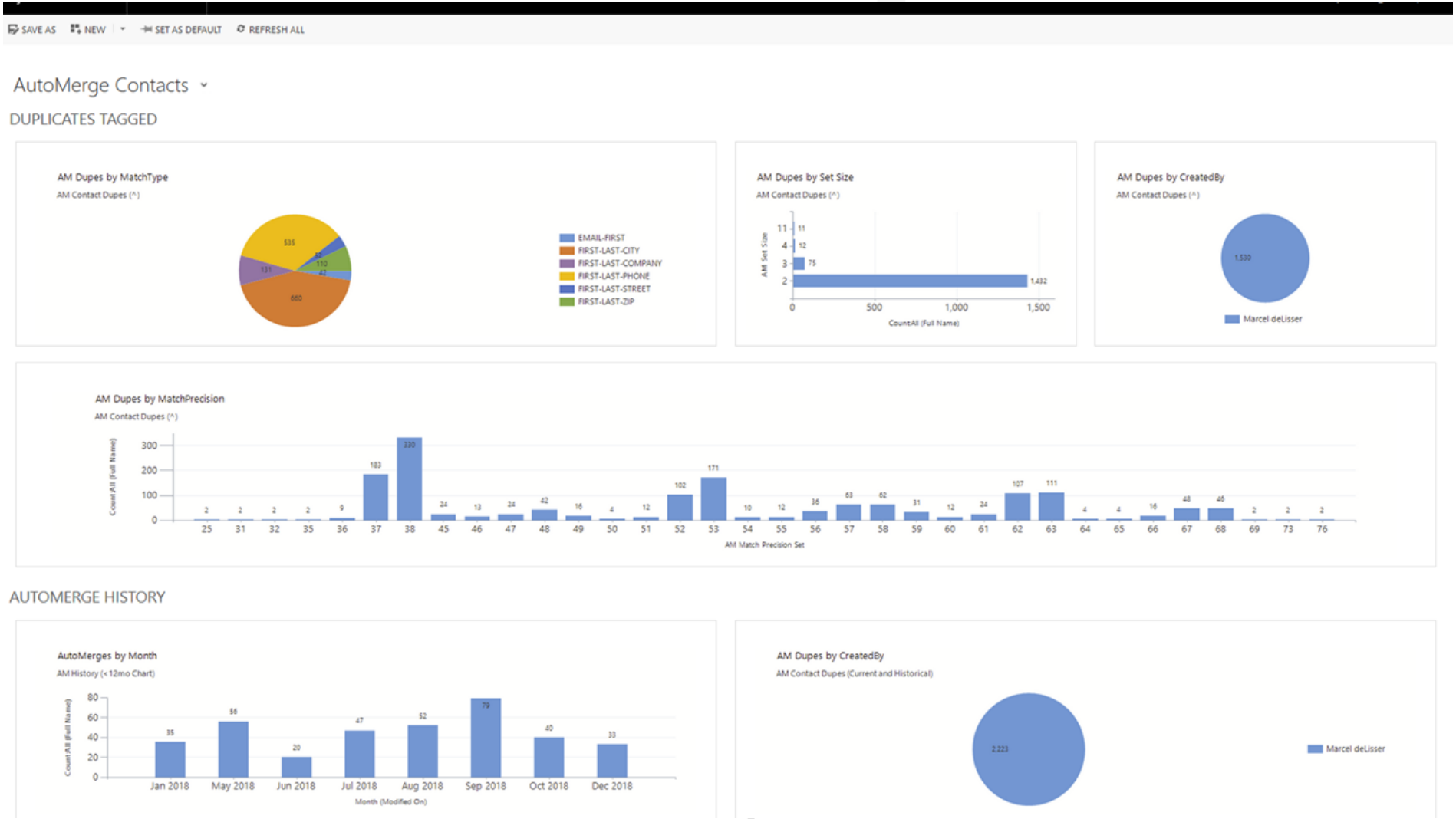
FEATURE	CRM	AUTOMERGE
Manual Merge Dialog	✓	
Manually Merge for up to 250 Duplicate Sets at a time		✓
Automatically Merge for All Duplicate Sets		✓
Match Precision metric available for each Duplicate Set		✓
Preservation of populated fields otherwise lost on designated loser record		✓
Address Block Preservation (2 Address Blocks, configurable) as a block.		✓
Merge-winner determination from fields on to-be-merged record (i.e. Contact)	✓	✓
Merge-winner determination from fields on related record (i.e. Owning User/Parent Account/Business Unit/Primary Contact		✓
Quickly Validate and Modify Merge-winner determination		✓
Quickly set one or more records to be ignored by duplicate analyzer and merging		✓
View Historically Merged (Loser) Records from within the remaining Winner record		✓
Dashboards of historical and upcoming merges		✓
Configure merges to be performed Outside of Business Hours		✓



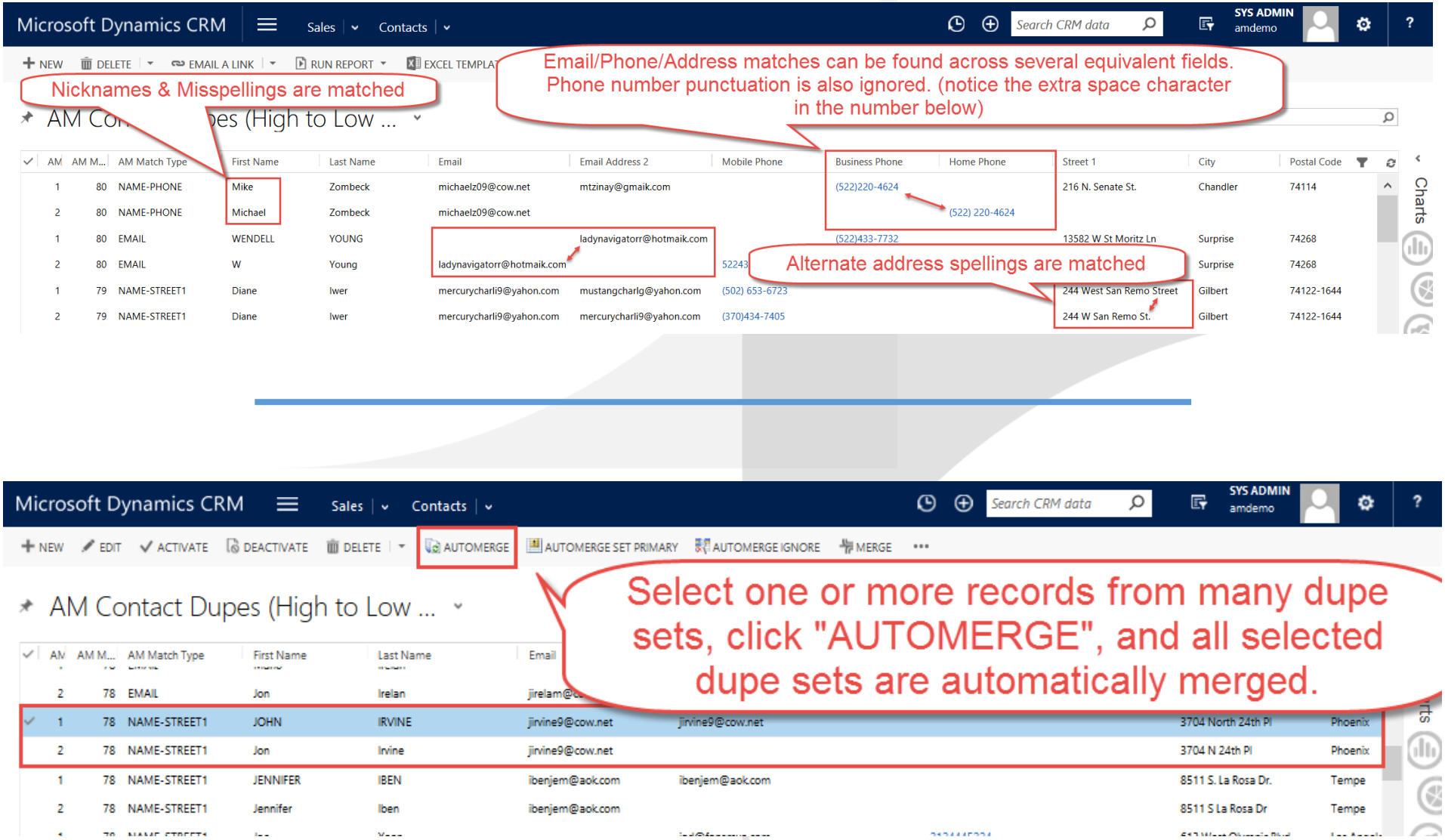
* N:N records are repointed to Winner too.

LIVE DEMONSTRATION

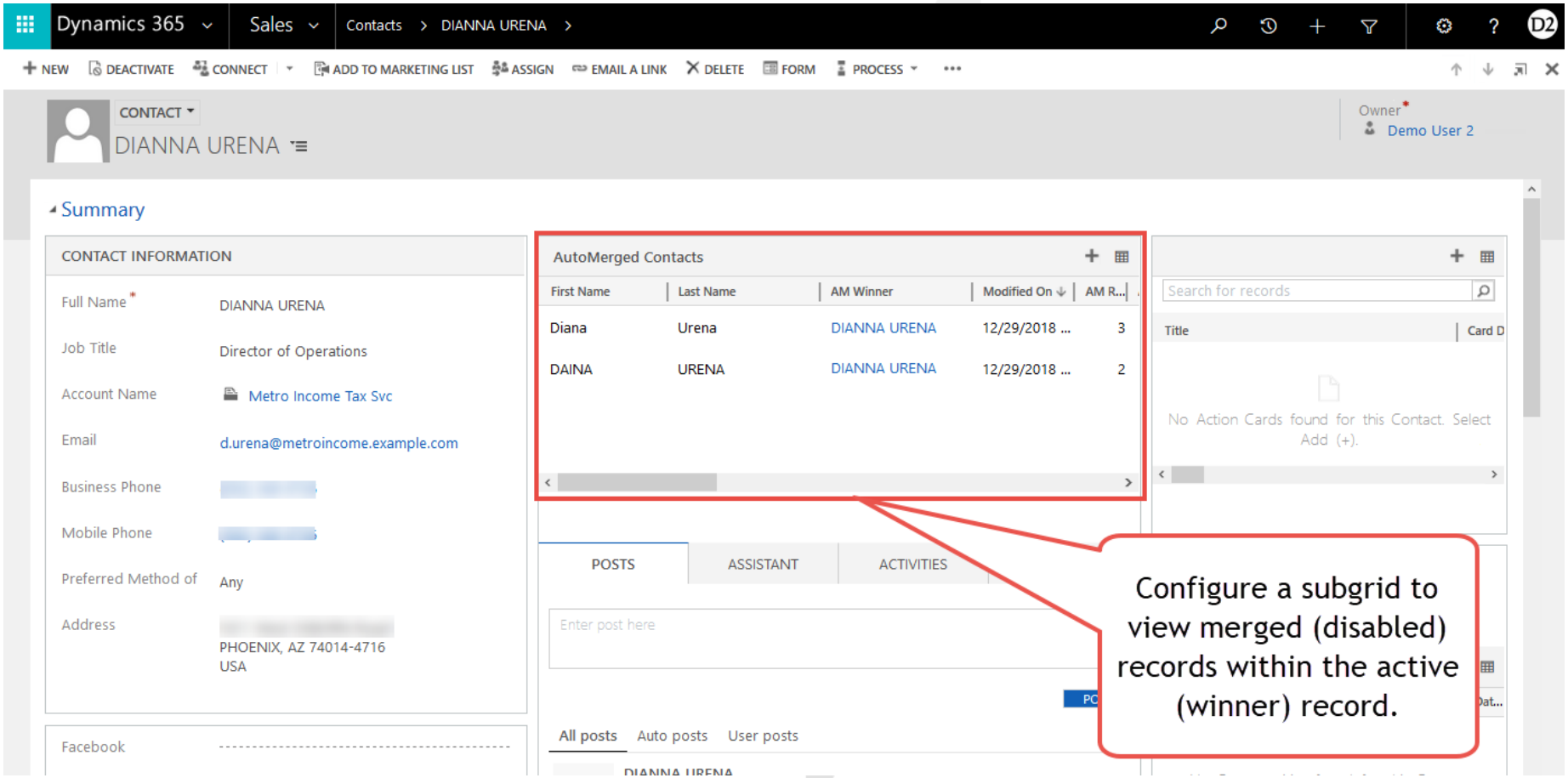
Overview Dashboard of Tagged and Merged Duplicates



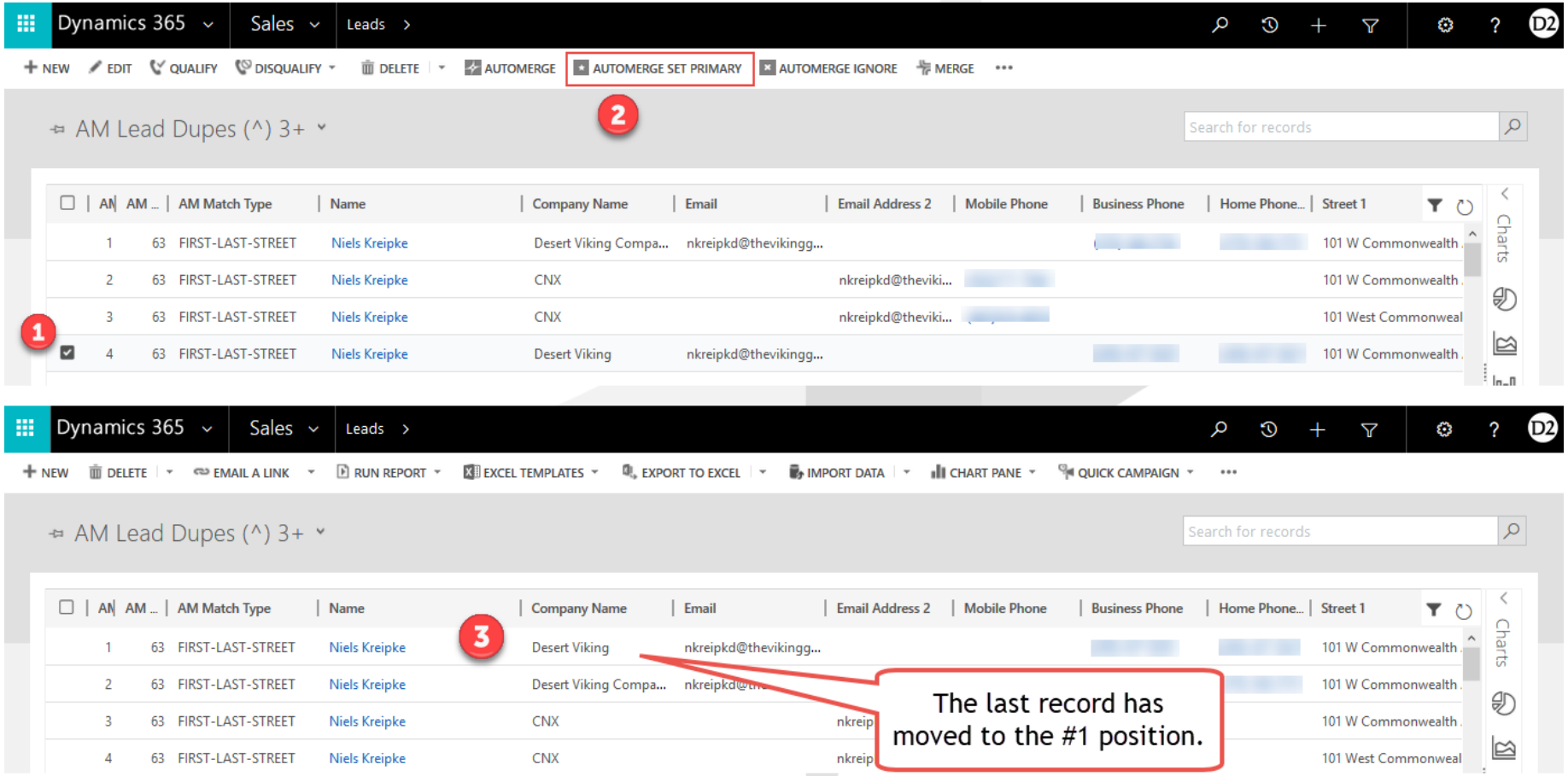
Intelligent Analysis of Duplicates



Subgrid of Merged Records



Set Primary Feature



Standard Match Criteria

LEAD MATCHING	ACCOUNT MATCHING	CONTACT MATCHING
Name[1] - Phone[1,2]		Name[1] - Phone[1,2]
Name[1] - Street[1,2]		Name1 - Street[1,2]
Name[1] - Postalcode[2]		Name[1] - Postalcode[2]
Name[1] - City[2]		Name1 - City[2]
Name[1] - CompanyName[1]		Name[1] - ParentCompanyName[1]
Email[2]	Email[2]	Email[2]
CompanyName[1] - Phone[1,2]	CompanyName[1] - Phone[1,2]	
CompanyName[1] - Street[1,2]	CompanyName[1] - Street[1,2]	
CompanyName[1] - Postalcode[2]	CompanyName[1] - Postalcode[2]	
CompanyName[1] - City[2]	CompanyName[1] - City[2]	

Key:

1. These fields are “fuzzy” matched which catches nicknames, misspellings and alternate spellings.
2. These fields are matched “cross-field” meaning across all equivalent fields on the record. E.g. emailaddress[1,2or3]

AutoMerge - FAQs

Q: How does AutoMerge determine what is a "duplicate" Lead, Account or Contact?
A: Our default matching logic has been tested against 100s of millions of real CRM records and uses combinations of Name, Address, Telephone, Email, etc… to find duplicates. If you need to include your customized fields in the matching logic, that works too. Remember that you will always be able to validate the duplicates found prior to "AutoMerging" them.

Q: What is a "Data Quality Report" exactly?
A: The report is a summary analysis of your entire set of Leads/Accounts/Contacts. For each of these entities, you will see how many duplicates were detected using our default matching logic and some clues as to how we found them. You will also receive an Excel file of several hundred sample duplicate sets from your CRM for you to validate individually. The Data Quality Report provides actionable insight as to how serious your duplicate problem has become. The report is provided free, and none of your CRM data is modified in the process.

Q: How does AutoMerge determine the primary record which will "win" the pending AutoMerge operation?
A: The default logic would have the most recently updated Lead/Account/Contact win the pending Merge, but this can be customized to follow any decision logic you can imagine, including referencing information on related records such as Activities, Opportunities, Cases or Custom entities. On a set by set basis, you can change which record should "win" the pending AutoMerge operation by using our "AutoMerge Set Primary" button.

Q: Where does the non-Primary Contact go after it's been AutoMerged?
A: The non-Primary record(s) are disabled but not deleted. Merged Leads/Accounts/Contacts can always be seen in a subgrid from the remaining Primary record. That is until such time as you decide to Bulk-Delete them to recover the disk space they occupy.

Q: The built-in merge wizard lets me choose fields to preserve from each record, how does AutoMerge handle this?
A: AutoMerge has an end-user-configurable set of fields that are reviewed prior to every AutoMerge operation. During the AutoMerge process, for each of the fields, if the Primary record has no value for that field, and the non-Primary does, that field is copied from the non-Primary into the Primary record. The built-in CRM merge wizard is much too cumbersome and error-prone to use for more than a few sets of duplicates.

Q: Can I control which duplicate sets are AutoMerged?
A: Yes! No duplicate sets are automatically merged until you say so. You can use our "AutoMerge" command bar/ribbon button to merge sets yourself, or tell us to get it done off-hours. AutoMerge also has a "Match Precision" % field to let you know how similar the records in each set of duplicates are. With this you can have us AutoMerge all dupes sets above X% and manually Validate/AutoMerge the rest yourself.

Q: Can I ignore specific records from AutoMerge?
A: Yes, use our "AutoMerge Ignore" command bar/ribbon button to ignore specific records from being merged and ever matched up again.

AutoMerge – FAQs (cont)

Q: How are duplicate records getting in my CRM?
A: Dynamics CRM allows several ways to input leads, account and contacts. Manual entry, import wizard, and data integrations with other business line systems. All of these processes result in duplicates. Your end-users will know if there's a duplicate problem if they are in the CRM daily but they probably cannot quantify it. Our no-obligation data quality report will tell you how many duplicate leads, accounts or contacts you have and even give you some examples.

Q: "Fuzzy" what?
A: "Fuzzy Matching" just means not exact, but close enough. Our fuzzy matching logic will find duplicates regardless of the various ways we humans enter data. Ask ten people to create a single new Contact record with the usual name, address and phone fields and you'll get ten different results. AutoMerge will find these duplicates and match them up.

Q: How does your Cloud service work if our CRM is On-Premise behind our corporate firewall?
A: Our service works with CRM Online, Partner-hosted or On-Premise with Internet Facing Deployment. Let us know if you are running CRM behind a closed firewall as we have ways to overcome this and still keep your network safe.

Q: Is my CRM data safe?
A: We take the security of your data very seriously. #1 - we only transfer the few fields necessary to detect duplicates, never any sensitive fields. #2 - your data is transmitted using SSL encryption and resides (at-rest) on our Azure Analysis servers encrypted AES_128. #3 - we promptly delete your data when analysis is complete.

Q: Our CRM has several business units which may contain legitimate duplicates across them. How do you avoid detecting and AutoMerging them?
A: Of course, we can partition your data just about any way you can imagine. This is no problem.

Q: What versions of Dynamics CRM does AutoMerge with?
A: AutoMerge works with CRM 2011/13/15/16/365. On-premise, CRM Online or Partner-hosted.

Q: Do you have a Partner program?
A: Yes we do! Dynamics CRM Partners are welcome to join our partner program and receive several benefits including free AutoMerge use. Contact us at sales@genbil.com

AutoMerge Engagement Steps

1. Trial / Data Quality Report
2. One Hour Discovery/Requirements Gathering Session
3. Final Agreement Approval
4. Import AutoMerge Managed Solution (if not completed in #1)
5. Customize Matching/Ranking Rules
6. Initial Analysis & Tagging Cycle
7. Customer review of Matched Records
8. Tweak Matching/Ranking Rules (if necessary)
9. AutoMerge Onboarding Training
10. Go-Live via AutoMerge Management Application

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AutoMerge List Prices

	Free Trial	1-Time Use		Standard	Professional	Enterprise
	$0	$0.10/duplicate (min:$495)		$2000/year subscription	$4000/year subscription	Call Us
Data Quality Report	✓	✓		✓	✓	✓
Incl. Analysis Credits	1 Analysis Performed	1 Analysis Performed		2MIL/year	6MIL/year	12MIL/year
Add-on Analysis Credits	N/A	N/A		$250/MIL	$125/MIL	$50/MIL
Matching/Ranking Rules	Default	Default		Customizable	Customizable	Customizable
Tagging of Duplicates Found	500 dupe sets tagged (>90% precision)	✓		✓	✓	✓
Incl. Discovery/Consulting	✗	1h		2h/year	4h/year	8h/year
AutoMerge Management Application Access	✗	✗		1 user	2 users	4 users
AutoMerging In-Bulk from CRM List View	✓	✓		✓	✓	✓
AutoMerging In-Bulk from Management App	✗	✗		✓	✓	✓
Request Scheduling	✗	✗		✗	✓	✓
No Credit decrements for Non-Production Orgs	✗	✗		✗	✗	✓

Additional Pricing Details

• One Production Org and Unlimited Sandbox Orgs	No Extra Charge
• Add-on Discovery/Duplicate Analysis Consulting	$160/hour
• Add-on AutoMerge Management Application User	$240/year
• Special Rates for Non-Profit Organizations	Call Us
• Dynamics Partners	Free

Standard Subscription free for Dynamics Partners (1 add-on AM Mgmt App User required)

Satisfaction is guaranteed with all our services.

Data Safeguard Practices

Genbil takes the security of the Company's CRM data very seriously and therefore implements several industry recognized precautions to safeguard it.

- AutoMerge service only collects fields pertinent to analysis of duplicates. This includes Personally Identifiable Information (PII).
- Data is only transmitted via SSL or a VPN connection directly to/from our Azure Cloud servers. If Company uses Dynamics 365, their CRM data will never travel over Internet at all since it already resides in an Azure datacenter.
- Company's AutoMerge profile defines which Azure Datacenter their data will be processed.
- Data is encrypted at-rest using SQL Transparent Data Encryption (TDE) using AES_128.
- Only Genbil's managing partners and delivery-path-based analysts have access to analysis servers.
- All personally identifiable information (PII) is scrubbed directly following AutoMerge analysis.

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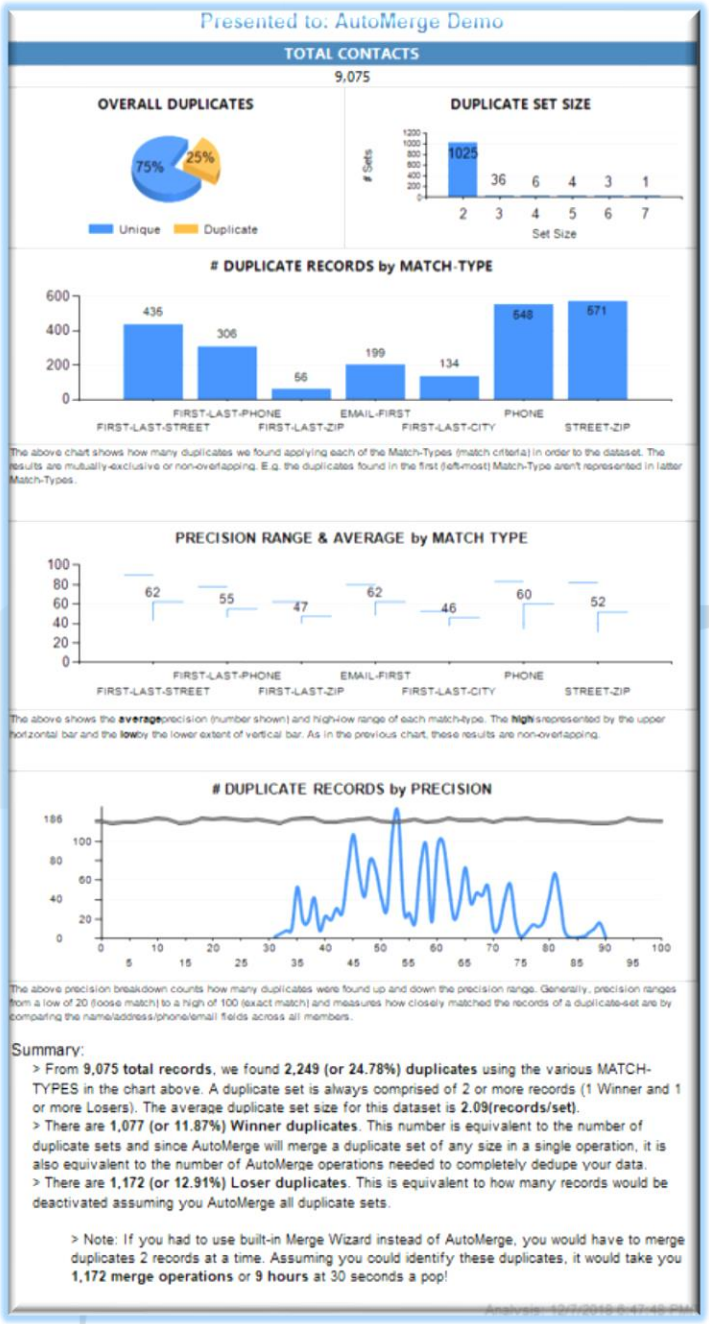
sales@genbil.com

Along with this Summary page, you'll receive an Excel Spreadsheet with 100s of sample duplicates from your CRM.

Microsoft Dynamics CRM
Online/On-Premise v2011/13/15/16/D365

Microsoft Azure

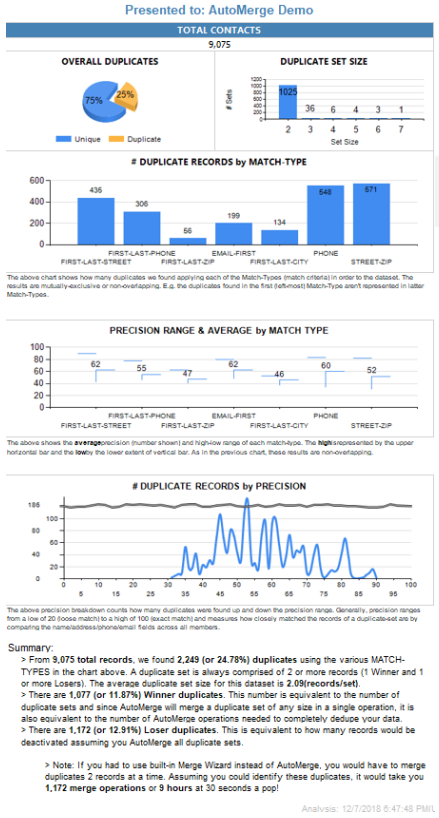


What is the AutoMerge Trial?

Our trial consists of **two parts**. The trial typically commences automatically after you verify your CRM Connection using a custom URL we email you. Filling out the secure online form, you grant credentials to your CRM, and trigger a trial analysis.

Part 1: Data Quality Report

Analysis of CRM's Accounts/Contacts/Leads.



Part 2: Optional tagging of some random duplicates

If – prior to filling out the secure online verification form, you have imported our AutoMerge managed solution into your CRM, then following the creation of the data quality report in #1, our Azure-based analysis server will tag of up to 100 sets of duplicates in your CRM. This way you can evaluate AutoMerge's full functionality end-to-end.

Note: Deleting our managed solution leaves nothing behind in your CRM except any merges you may have performed.

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